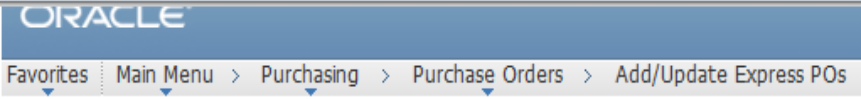


LAST REVISED DATE: 04/01/2016

General Information

Task	Process Information
Creating a Change Order for an Express Purchase Order	<p>When you update an Express PO that has been dispatched, you create or append a change order in GEARS. Additions, deletions, and/or changes to an Express PO line or schedule will create a change order. Updates to an Express PO may include things such as:</p> <ul style="list-style-type: none"> • Increase price/amount or quantity • Add a line to a PO, <u>OR</u> • Change distribution or shipping information <p>NOTE: Changes to Express POs may require that the Express PO be (1) resubmitted for approval; (2) budget checked; and (3) Dispatched.</p>

GEARS Navigation

Purchasing > Purchase Orders > Add/Update Express POs	
--------------------------------------------------------------------	--------------------------------------------------------------------------------------

1.0 Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	Locate the existing Express PO that you want to update by selecting the "Find an Existing Value" Tab.	<p>Express Purchase Order</p> <p>Find an Existing Value Add a New Value</p>

2.

Enter the PO number or enter fields in the Search Criteria.

In this example, PO ID 0000055668 is entered.

Express Purchase Order

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Add a New Value

Search Criteria

Business Unit:

=

MDJUD

x

PO ID:

begins with

0000055668

Purchase Order Date:

=

PO Status:

=

Short Vendor Name:

begins with

Vendor ID:

begins with

Vendor Name:

begins with

Buyer:

begins with

Buyer Name:

begins with

PO Type:

=

Purchase Order Reference:

begins with

Hold From Further Processing

☐

Case Sensitive

☐

Search

Clear

Basic Search

Save Search Criteria

3.

Click the

Search

button.

4a.

For “Amount Only” Express POs –

NOTE: Steps 4a through 4e allow you to change the amount of the Express PO.

The Express PO MUST be “Amount Only” to change the amount. Click on the Line Details icon to confirm.

Express Purchase Order

Purchase Order

Business Unit:

MDJUD

PO Status:

Dispatched

PO ID:

0000055668

Budget Status:

Valid

Copy From:

☐ Hold From Further Processing

Header

*PO Date:

02/02/2016

Vendor Search

Doc Tot Status:

Valid

*Vendor:

RUDOLPHSOF-001

Vendor Details

Backorder Status:

Not Backordered

*Vendor ID:

0000055668

RUDOLPHS OFFICE & COMPUTER SUPPLY INC.

Receipt Status:

Received

*Buyer:

FIELD_BUYER

*Dispatch Method:

Print

Dispatch

PO Reference:

BPO - Office Supplies

Amount Summary

Merchandise:

897.34

Header Details

Activity Summary

Freight/Tax/Misc.:

0.00

PO Defaults

Document Status

Total Amount:

897.34

Requisitions

Add Comments

Encumbrance:

897.34

PO Activities

Add ShipTo Comments

Balance:

Add Items From

Select Lines To Display

Purchasing Kit

Catalog

Item Search

Line:

To:

Retrieve

Lines

Line

Item

Description

PO Qty

*UOM

Category

Merchandise Amt

Status

1

rudolphs supply order# 2520000

1.0000

AMT

0902

897.34

Approved

Schedules

Sched

*Due Date

*Ship To

*PO Qty

Price

Merchandise Amt

Status

*Distribute by

1

02/02/2016

C74-CRT2

1.0000

897.34000

897.34

Active

Amount

Distributions

Chartfields

Details/Tax

Asset Information

Req Detail

Statuses

Budget Information

Personalize

Dist

Status

Percent

Merchandise Amt

Curr

*GL Unit

*Account

Batch Agt

Fund

Dept

Program

Approp Number

Approp Yr

1

Open

100.0000

897.34

USD

MDJUD

0902

C50

0001

B004

A0004

AY2016

Expand All

Collapse All

View Printable Version

View Approvals

Go to:

More

Save

Return to Search

Notify

Refresh

Add

Update/Display

Attributes

Physical Nature:

Goods

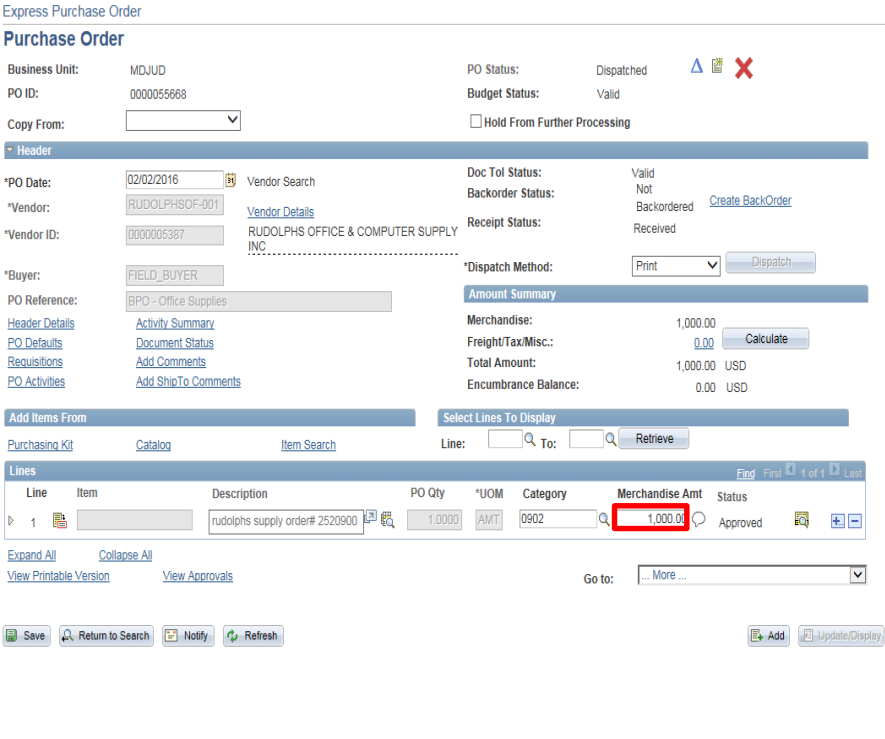
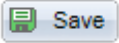
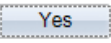
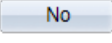
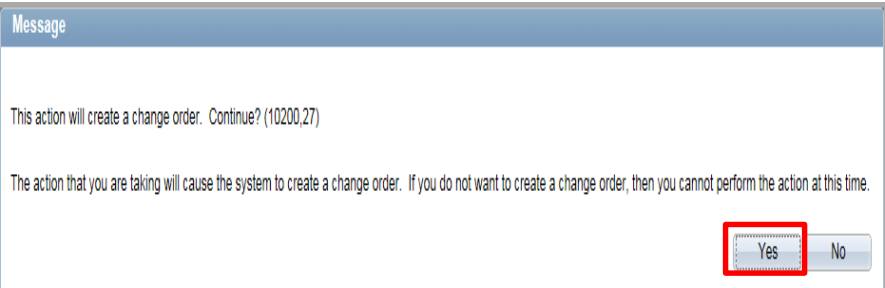
*Price Qty:

Schedule Quantity

*Price Date:

PO

Amount Only

<p>4b.</p>	<p>For “Amount Only” Express POs –</p> <p>Express Purchase Order</p> <p>On the Purchase Order screen, enter the amount change on the PO line.</p> <p>In this example, the PO Line 1 was increased from \$897.34 to \$1000.00.</p>	 <p>The screenshot shows the 'Express Purchase Order' interface. At the top, it displays 'Purchase Order' with business unit 'MDJUD', PO ID '000055668', and status 'Dispatched'. Below this, there are sections for 'Header' and 'Amount Summary'. The 'Header' section includes fields for PO Date (02/02/2016), Vendor (RUDOLPHS OFF-001), and Buyer (FIELD_BUYER). The 'Amount Summary' section shows a Merchandise amount of 1,000.00, Freight/Tax/Misc. of 0.00, and a Total Amount of 1,000.00 USD. At the bottom, there is a table of lines with one line item: Line 1, Item, Description 'rudolphs supply order# 2520900', PO Qty '1.0000', UOM 'AMT', Category '0902', and Merchandise Amt '1,000.00'. The 'Merchandise Amt' field is highlighted with a red box.</p>
<p>4c.</p>	<p>For “Amount Only” Express POs –</p> <p>Click the  button.</p>	
<p>4d.</p>	<p>For “Amount Only” Express POs –</p> <p>A system message will display noting that the action will create a change order. To proceed with the change, click the  button.</p> <p>NOTE: If you select the  button, the system will not accept your changes and the field will remain unchanged.</p>	 <p>The screenshot shows a 'Message' dialog box with the text: 'This action will create a change order. Continue? (10200,27)'. Below this, there is a longer message: 'The action that you are taking will cause the system to create a change order. If you do not want to create a change order, then you cannot perform the action at this time.' At the bottom right, there are two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red box.</p>

4e.

For “Amount Only” Express POs –

If the PO saves successfully, the PO Status changes from ‘Dispatched’ to either ‘Approved’ or ‘Pending Approval’ (depending upon the total dollar amount of the PO), and the Budget Status changes from ‘Valid’ to ‘Not Chk’d’.

****Skip to Step 7 to continue processing the Change Order for the Express PO amount change.**

Express Purchase Order

Purchase Order

Business Unit: MDJUD PO ID: 000055668 PO Status: Pend Appr Not Chk'd ✖

Change Order: 1 Budget Status: Not Chk'd ✖

Copy From: 1 ☐ Hold From Further Processing

Header

*PO Date: 02/02/2016 Vendor Search Doc Tot Status: Valid

*Vendor: RUDOLPHS OFFICE & COMPUTER SUPPLY Vendor Details Receipt Status: Received

*Vendor ID: 000005387 INC

*Buyer: FIELD_BUYER

PO Reference: BPO - Office Supplies

Header Details Activity Summary

PO Defaults Document Status

Requisitions Add Comments

PO Activities Add ShipTo Comments

Amount Summary

Merchandise: 1,000.00

Freight/Tax/Misc.: 0.00 Calculate

Total Amount: 1,000.00 USD

Encumbrance Balance: 0.00 USD

Add Items From Purchasing Kit Catalog Item Search **Select Lines To Display** Line: 1 To: 1 Retrieve

Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1		rudolphs supply order# 2520900	1.0000	AMT	0902	1,000.00	Pending

Expand All Collapse All

View Printable Version View Approvals

Go to: More

Save Return to Search Notify Refresh Add Update/Display

5a.

For “Quantity-Based” Express POs –

NOTE: Steps 5a through 5f allow you to change the quantity or price of the Express PO.

The Express PO MUST be distributed by Quantity to change the quantity or price.

In this example, PO ID 000055436 is selected and the PO Quantity will be increased.

Express Purchase Order

Purchase Order

Business Unit: MDJUD PO ID: 000055436 PO Status: Δ ✖ Dispatched

Copy From: 1 Budget Status: Valid

☐ Hold From Further Processing

Header

*PO Date: 01/12/2016 Vendor Search Doc Tot Status: Valid

*Vendor: NICSTOGGER-001 Vendor Details Backorder Status: Not Backordered Create BackOrder

*Vendor ID: 000007337 NICS TOGGERY BIG & TALL Receipt Status: Received

*Buyer: FIELD_BUYER

PO Reference: BPO - Ballif Jackets

Header Details Activity Summary

PO Defaults Document Status

Requisitions Add Comments

PO Activities Add ShipTo Comments

Amount Summary

Merchandise: 220.00

Freight/Tax/Misc.: 0.00 Calculate

Total Amount: 220.00 USD

Encumbrance Balance: 0.00 USD

Add Items From Purchasing Kit Catalog Item Search **Select Lines To Display** Line: 1 To: 1 Retrieve

Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1		2 Navy Blue Ballif Jackets	2.0000	EA	0913	220.00	Approved

Schedules

Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amt	Status
1	01/12/2016	C67-CLERK	2.0000	110.00000	220.00	Active

Distributions

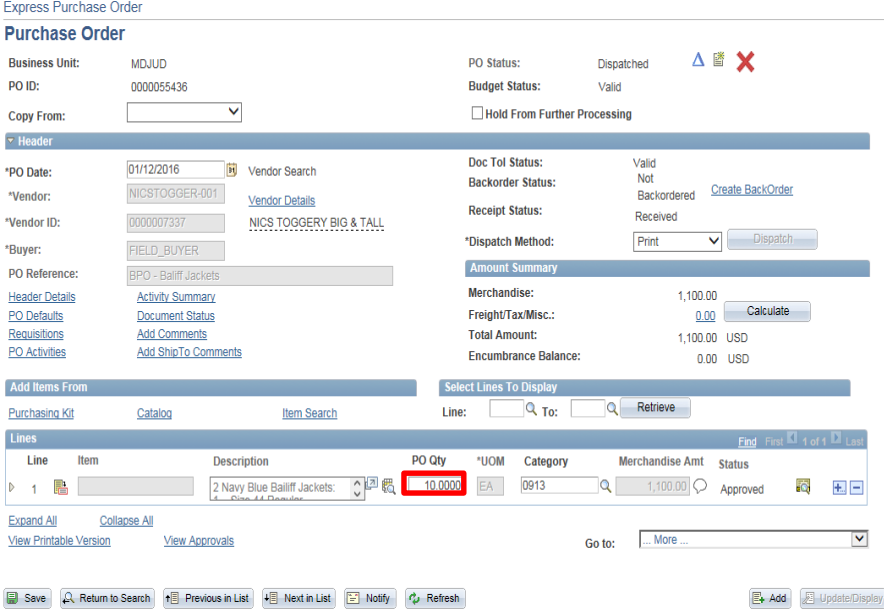
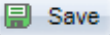
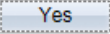
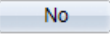
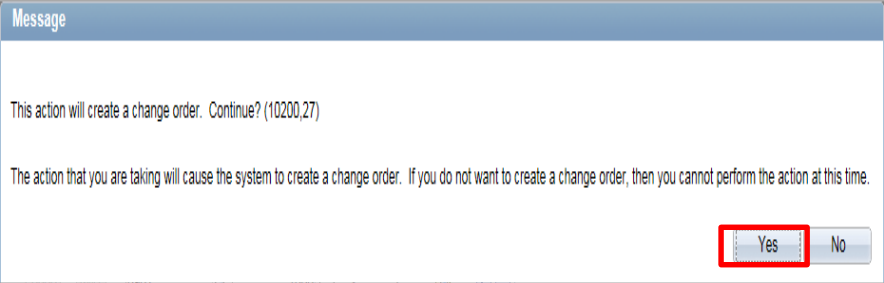
Dist	Status	Percent	PO Qty	Merchandise Amt	Curr	*GL Unit	*Account	Batch Agg	Fund	Dept	Program	Approp Number	A
1	Open	100.0000	2.0000	220.00	USD	MDJUD	0913	C50	0001		B004	A0004	A

Expand All Collapse All

View Printable Version View Approvals

Go to: More

Save Return to Search Notify Refresh Add Update/Display

<p>5b.</p>	<p>For “Quantity-Based” Express POs –</p> <p><u>Express Purchase Order</u></p> <p>On the Purchase Order screen, enter the quantity change on the PO line.</p> <p>In this example, the PO Qty was increased from 2 to 10.</p>	 <p>The screenshot shows the 'Express Purchase Order' interface. At the top, it displays 'Purchase Order' with business unit 'MDJUD', PO ID '000055436', and status 'Dispatched'. Below this, there are sections for 'Header' and 'Amount Summary'. The 'Header' section includes fields for PO Date, Vendor, Vendor ID, Buyer, PO Reference, and various links like 'Header Details', 'Activity Summary', 'Document Status', 'Add Comments', and 'Add ShipTo Comments'. The 'Amount Summary' section shows 'Merchandise' at 1,100.00, 'Freight/Tax/Misc.' at 0.00, 'Total Amount' at 1,100.00 USD, and 'Encumbrance Balance' at 0.00 USD. At the bottom, there is a table of 'Lines'. The first line is highlighted, showing '2 Navy Blue Bailiff Jackets' with a 'PO Qty' of '10.0000' (highlighted in a red box in the original image). Navigation buttons like 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', and 'Refresh' are at the bottom.</p>
<p>5c.</p>	<p>For “Quantity-Based” Express POs –</p> <p>Click the  button.</p>	
<p>5d.</p>	<p>For “Quantity-Based” Express POs –</p> <p>A system message will display noting that the action will create a change order. To proceed with the change, click the  button.</p> <p>NOTE: If you select the  button, the system will not accept your changes and the field will remain unchanged.</p>	 <p>The screenshot shows a 'Message' dialog box. It contains the text: 'This action will create a change order. Continue? (10200,27)' and 'The action that you are taking will cause the system to create a change order. If you do not want to create a change order, then you cannot perform the action at this time.' At the bottom right, there are two buttons: 'Yes' (highlighted in a red box in the original image) and 'No'.</p>

5e.

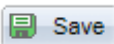
For “Quantity-Based” Express POs –

Once the quantity has been changed, it is now possible to change the price (if needed). If a price change is not needed, skip this step.

Express Purchase Order

On the **Purchase Order** screen, expand the **Schedule Section**, and enter the **price change** on the PO line.

In this example, the Price was increased from 110 to 200.

Click the  **Save** button.

Express Purchase Order
Purchase Order

Business Unit: MDJUD PO Status: Dispatched
PO ID: 0000055436 Budget Status: Valid
Copy From: ☐ Hold From Further Processing

Header

*PO Date: 01/12/2016 Vendor Search
*Vendor: NICSTOGGER-001 Vendor Details
*Vendor ID: 0000007337 NICS TOGGERY BIG & TALL
*Buyer: FIELD_BUYER
PO Reference: BPO - Balliff Jackets
Header Details Activity Summary
PO Defaults Document Status
Requisitions Add Comments
PO Activities Add ShipTo Comments

Doc Tol Status: Valid
Backorder Status: Not Backordered Create BackOrder
Receipt Status: Received
*Dispatch Method: Print Dispatch

Amount Summary

Merchandise: 2,000.00
Freight/Tax/Misc.: 0.00 Calculate
Total Amount: 2,000.00 USD
Encumbrance Balance: 0.00 USD

Add Items From **Select Lines To Display**

Purchasing Kit Catalog Item Search Line: To: Retrieve

Lines

Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1		2 Navy Blue Balliff Jackets:	10.0000	EA	0913	2,000.00	Approved

Schedules







Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amt	Status	*Distribute by
1	01/12/2016	C67-CLERK	10.0000	200.00000	2,000.00	Active	Quantity

Distributions

Dist	Status	Percent	PO Qty	Merchandise Amt	Curr	*GL Unit	*Account	Batch Apy	Fund	Program	Approp Number	Approp Yr	PCA
1	Open	100.0000	10.0000	2,000.00	USD	MDJUD	0913	C50	0001	B004	A0004	AY2016	40671

Expand All Collapse All
View Printable Version View Approvals

Go to: More ...

5f.

For “Quantity-Based” Express POs –

If the PO saves successfully, the PO Status changes from ‘Dispatched’ to either ‘Approved’ or ‘Pending Approval’ (depending upon the total dollar amount of the PO), and the Budget Status changes from ‘Valid’ to ‘Not Chk’d’.

****Skip to Step 7 to continue processing the Change Order for the Express PO quantity/price change.**

Express Purchase Order
Purchase Order

Business Unit: MDJUD PO Status: Pending Appr
PO ID: 0000055436 Budget Status: Not Chk'd
Change Order: 1
Copy From: ☐ Hold From Further Processing

Header

*PO Date: 01/12/2016 Vendor Search
*Vendor: NICSTOGGER-001 Vendor Details
*Vendor ID: 0000007337 NICS TOGGERY BIG & TALL
*Buyer: FIELD_BUYER
PO Reference: BPO - Balliff Jackets
Header Details Activity Summary
PO Defaults Document Status
Requisitions Add Comments
PO Activities Add ShipTo Comments

Doc Tol Status: Valid
Receipt Status: Received
*Dispatch Method: Print Dispatch

Amount Summary

Merchandise: 1,100.00
Freight/Tax/Misc.: 0.00 Calculate
Total Amount: 1,100.00 USD
Encumbrance Balance: 0.00 USD

Add Items From **Select Lines To Display**









Purchasing Kit Catalog Item Search Line: To: Retrieve


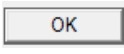
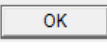
Lines

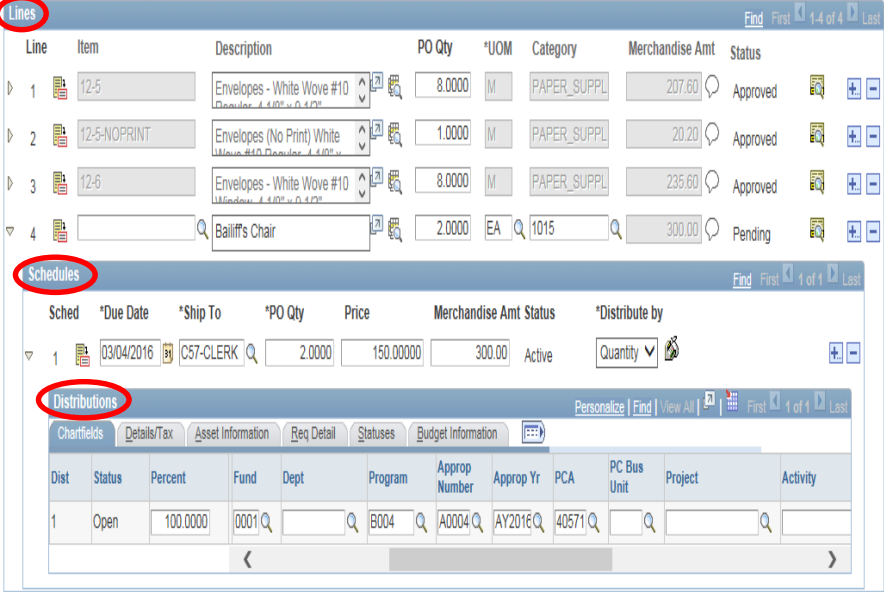


Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1		2 Navy Blue Balliff Jackets:	10.0000	EA	0913	1,100.00	Pending








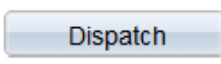
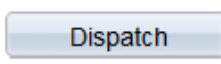
Expand All Collapse All
View Printable Version View Approvals



Go to: More ...

6a.	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>NOTE: Steps 6a through 6h allow you to <u>add a line to the Express PO</u>.</p> <p>In this example, PO ID <i>0000055489</i> is selected.</p> <p>Express Purchase Order</p> <p>On the Purchase Order screen, click the  plus sign button in the Lines section.</p>	<div><div>Express Purchase Order</div><div><div><div><div>Purchase Order</div><div>Business Unit: MDJUD PO ID: 0000055489 Copy From: <div></div></div><div>PO Status: Dispatched Budget Status: Valid <input type="checkbox"/> Hold From Further Processing</div></div><div><div>Header</div><div><div>*PO Date: 01/15/2016 *Vendor: MARYLANDCO-003 *Vendor ID: 0000006439 *Buyer: FIELD_BUYER PO Reference: BPO - Stationery & Envelopes</div><div>Vendor Search Vendor Details MARYLAND CORRECTIONAL ENTERPRISE Activity Summary Document Status Add Comments Add ShipTo Comments</div></div><div><div>Doc Tol Status: Valid Backorder Status: Not Backordered Receipt Status: Received *Dispatch Method: Print</div><div>Valid Create BackOrder Received Dispatch</div></div></div><div><div>Amount Summary</div><div>Merchandise: 463.40 Freight/Tax/Misc.: 0.00 Total Amount: 463.40 USD Encumbrance Balance: 0.00 USD</div><div>Calculate</div></div></div><div><div>Add Items From</div><div>Select Lines To Display</div><div>CatalogItem Search</div><div>Line: <div></div> To: <div></div> Retrieve</div></div><div><div>Lines</div><table><tr><th>Line</th><th>Item</th><th>Description</th><th>PO Qty</th><th>*UOM</th><th>Category</th><th>Merchandise Amt</th><th>Status</th></tr><tr><td>1</td><td>12-5</td><td>Envelopes - White Wove #10</td><td>8.0000</td><td>M</td><td>PAPER_SUPPL</td><td>207.60</td><td>Approved</td></tr><tr><td>2</td><td>12-5-NOPRINT</td><td>Envelopes (No Print) White</td><td>1.0000</td><td>M</td><td>PAPER_SUPPL</td><td>20.20</td><td>Approved</td></tr><tr><td>3</td><td>12-6</td><td>Envelopes - White Wove #10</td><td>8.0000</td><td>M</td><td>PAPER_SUPPL</td><td>235.60</td><td>Approved</td></tr></table><div><div>Expand All</div><div>Collapse All</div><div>View Printable Version</div><div>View Approvals</div></div><div>Go to: <div>More</div></div><div><div>Save</div><div>Return to Search</div><div>Previous in List</div><div>Next in List</div><div>Notify</div><div>Refresh</div><div>Add</div><div>Update/Display</div></div></div></div></div>	Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status	1	12-5	Envelopes - White Wove #10	8.0000	M	PAPER_SUPPL	207.60	Approved	2	12-5-NOPRINT	Envelopes (No Print) White	1.0000	M	PAPER_SUPPL	20.20	Approved	3	12-6	Envelopes - White Wove #10	8.0000	M	PAPER_SUPPL	235.60	Approved								
Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status																																			
1	12-5	Envelopes - White Wove #10	8.0000	M	PAPER_SUPPL	207.60	Approved																																			
2	12-5-NOPRINT	Envelopes (No Print) White	1.0000	M	PAPER_SUPPL	20.20	Approved																																			
3	12-6	Envelopes - White Wove #10	8.0000	M	PAPER_SUPPL	235.60	Approved																																			
6b.	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>Confirm the number of rows to be added. If one row is to be added, leave the default, ‘1’ in the field.</p> <p>In this example, only one row will be added to the Express PO.</p>	<div><div>state.md.us needs some information</div><div><div>Script Prompt:</div><div>Enter number of rows to add:</div><div>1</div><div>OK</div><div>Cancel</div></div></div>																																								
6c.	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>Click the  button.</p>																																									
6d.	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>A system message will display noting that the action will create a change order. To proceed with the change, click the  button.</p>	<div><div>Message</div><div><div>This action will create a change order. (10250,178)</div><div>This PO has been dispatched, add/delete/change a line or schedule will create a change order.</div><div>OK</div></div></div>																																								
6e.	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>Express Purchase Order</p> <p>On the Purchase Order screen, the new PO line is added.</p> <p>In this example, this PO had 3 PO lines and a 4th line was added.</p>	<div><div>Lines</div><table><tr><th>Line</th><th>Item</th><th>Description</th><th>PO Qty</th><th>*UOM</th><th>Category</th><th>Merchandise Amt</th><th>Status</th></tr><tr><td>1</td><td>12-5</td><td>Envelopes - White Wove #10</td><td>8.0000</td><td>M</td><td>PAPER_SUPPL</td><td>207.60</td><td>Approved</td></tr><tr><td>2</td><td>12-5-NOPRINT</td><td>Envelopes (No Print) White</td><td>1.0000</td><td>M</td><td>PAPER_SUPPL</td><td>20.20</td><td>Approved</td></tr><tr><td>3</td><td>12-6</td><td>Envelopes - White Wove #10</td><td>8.0000</td><td>M</td><td>PAPER_SUPPL</td><td>235.60</td><td>Approved</td></tr><tr><td>4</td><td></td><td></td><td></td><td></td><td></td><td></td><td>Pending</td></tr></table></div>	Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status	1	12-5	Envelopes - White Wove #10	8.0000	M	PAPER_SUPPL	207.60	Approved	2	12-5-NOPRINT	Envelopes (No Print) White	1.0000	M	PAPER_SUPPL	20.20	Approved	3	12-6	Envelopes - White Wove #10	8.0000	M	PAPER_SUPPL	235.60	Approved	4							Pending
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4							Pending																																			

<p>6f.</p>	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p><u>Express Purchase Order</u></p> <p>On the Purchase Order screen:</p> <p>The following are required fields:</p> <ul style="list-style-type: none"> Lines: Description, PO Qty, UOM, Category. Schedules: Due Date, Ship To, Price/Merchandise Amt. NOTE: If UOM on the line is anything other than “AMT”, enter the unit price in the “Price” field, else enter the amount in the “Merchandise Amt” field. Distributions: Account, Batch Agy, Fund, Program, Approp #, Approp Yr & PCA. <p>For additional information of how to complete a PO Line, refer to the Tip Sheet, Creating an Express Purchase Order on the GEARS website (http://mdcourts.gov/gears/pdfs/tipsheetcreatingexpresspo.pdf)</p>	
<p>6g.</p>	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>Click the  Save button.</p>	
<p>6h.</p>	<p>For both “Quantity-Based” and “Amount Only” Express POs –</p> <p>If the PO saves successfully, the PO Status changes from ‘Dispatched’ to either ‘Approved’ or ‘Pending Approval’ (depending upon the total dollar amount of the PO), and the Budget Status changes from ‘Valid’ to ‘Not Chk’d’.</p> <p>**Proceed to Step 7 to continue processing the Change Order for adding a line to the Express PO.</p>	<p>PO Status: Approved</p> <p>Budget Status: Not Chk'd </p>

<p>7.</p>	<p>To add additional comments or supporting attachments:</p>	<p>General Express PO comments/attachments:</p> <ul style="list-style-type: none"> click the Add Comments Header link select a group to display your comments to: <ul style="list-style-type: none"> <input type="checkbox"/> Send to Vendor <input type="checkbox"/> Show at Receipt <input type="checkbox"/> Show at Voucher <input type="checkbox"/> Approval Justification <p>Line specific comments/attachments:</p> <ul style="list-style-type: none"> click the  icon to the right of the Express PO Line select a group to display your comments to <ul style="list-style-type: none"> <input type="checkbox"/> Send to Vendor <input type="checkbox"/> Show at Receipt <input type="checkbox"/> Show at Voucher <p>Click the  button.</p>
<p>8.</p>	<p>NOTE: You cannot move forward with the remaining steps unless the Express PO is in "Approved" status.</p> <p></p> <p>Budget Check your Express PO.</p>	<p>NOTE: Only upon an "Approved" PO Status will you be able to run the Budget Check process by clicking the Budget Check icon .</p> <p>PO Status: Approved</p> <p>Budget Status: Not Chk'd </p>
<p>9.</p>	<p></p> <p>Dispatch your Express PO.</p>	<p>NOTE: Only upon an "Approved" PO Status and a "Valid" Budget Status will you be able to run the Dispatch process by clicking the  button.</p> <p>Dispatching your Express PO is <u>required</u> in order to Receive and Voucher against the Express PO.</p> <p>Dispatch Method: Print </p> <p>NOTE: The Dispatch Method defaults to "Print" but can be changed to "Email" for those vendors who have an email address associated with their vendor information on the Vendor Master File maintained by DBF.</p> <p>Dispatch Method: Email </p>

10.	<div></div> <div>Confirm the Dispatch Options & complete your Express PO.</div>	<div>Dispatching via the “Print” method will display the following Dispatch Options.</div> <div>Dispatch Options</div> <div><div><div>Fax Cover Page:</div><div>Server Name:</div><div>*Output Destination Type:</div><div>Output Destination Format:</div><div>Template ID:</div></div><div><div><div></div><div></div><div>WEB</div><div>PDF</div><div></div></div><div><div><input type="checkbox"/> Test Dispatch</div><div><input type="checkbox"/> Print BU Comments</div><div><input type="checkbox"/> Print Duplicate on PO</div><div><input type="checkbox"/> Print Changes Only</div><div><input checked="" type="checkbox"/> Print PO Item Description</div><div><input type="checkbox"/> Print Copy</div></div></div></div> <div>There is no need to alter these options, just click the <div>OK</div> button, then select <div>Yes</div> on the pop-up message to wait for the Dispatch process to complete. Waiting for this process to complete will allow you to view the Express PO status as Dispatched.</div> <div><div>NOTE:</div> You can click “No” rather than waiting for the Dispatch process to complete, however you will have to look up your Express PO to view the Dispatched status.</div>																
11.	<div></div> <div>Your Express PO is complete.</div>	<div>You will see the PO Status as “Dispatched” when the Dispatch process completes.</div> <div><div>PO Status:</div><div>Dispatched</div></div> <div><div>Budget Status:</div><div>Valid</div></div> <div><div>NOTE:</div> The Express Purchase Order must have these statuses to be received and vouchered against.</div>																
12.	<div>Once Dispatched, you can review the PDF version of the Express Purchase Order in your Report Manager under the Administration Tab. Navigation: Reporting Tools > Report Manager</div> <div><div>ORACLE®</div><div>Menu - Classic</div><div><div>Reporting Tools</div><div><div>Query</div><div>Connected Query</div><div>PS/nVision</div><div>BI Publisher</div><div>Pivot Grid</div><div>Reporting Console</div><div>Report Manager</div></div></div></div>	<div><div>Favorites</div><div>Main Menu</div><div>Reporting Tools</div><div>Report Manager</div></div> <div><div>List</div><div>Explorer</div><div>Administration</div><div>Archives</div></div> <div><div>View Reports For</div><div><div>User ID:</div><div>lauren.smith</div><div>Type:</div><div>Last</div><div>1</div><div>Days</div></div><div><div>Status:</div><div>Folder:</div><div>Instance:</div><div>to:</div></div></div> <div><div>Report List</div><div>Personalize</div><div>Find</div><div>View All</div><div>First</div><div>1-2 of 2</div><div>Last</div></div> <div><table><tr><th>Select</th><th>Report ID</th><th>Proc Instance</th><th>Description</th><th>Request Date/Time</th><th>Format</th><th>Status</th><th>Details</th></tr><tr><td><input type="checkbox"/></td><td>82516</td><td>93402</td><td>PO_DISPATCH - PO_DISPATCH.pdf</td><td>11/14/2013 4:24:17PM</td><td>Acrobat (*.pdf)</td><td>Posted</td><td>Details</td></tr></table></div>	Select	Report ID	Proc Instance	Description	Request Date/Time	Format	Status	Details	<input type="checkbox"/>	82516	93402	PO_DISPATCH - PO_DISPATCH.pdf	11/14/2013 4:24:17PM	Acrobat (*.pdf)	Posted	Details
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Important

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer the appropriate User Procedures and/or online references for any corresponding policies regarding this process.